



**Indiana Pro Bono Commission**  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

**Indiana Bar Foundation**  
230 East Ohio Street, Suite 200  
Indianapolis, IN 46204

## **COMBINED 2003 DISTRICT REPORT, 2005 PRO BONO GRANT APPLICATION, AND 2005 PLAN**

### **Pro Bono District 2**

**Applicant:** District 2 Pro Bono Legal Services Committee

**Mailing Address:** 1000 S. Michigan Street

**City:** South Bend, IN                      **Zip:** 46601

**Phone:** (574) 235-5354                      **Fax:** (574) 235-5382

**E-mail address:** probon2@ yahoo.com    **Website address:** None.

**Judicial Appointee:** Hon. Peter J. Nemeth, Judge, St. Joseph Probate Court, 1000 S. Michigan St., South Bend, IN 46601

**Plan Administrator:** Sherry L. Clarke

**Names of Counties served:** Elkhart, Kosciusko, Marshall, and St. Joseph

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**Number of registered attorneys (a) in each county:** Elkhart **221**, Kosciusko **80**, Marshall **48**, and St. Joseph **555** (as of 3/31/04); **(b) in district: 904** (as of 3/31/04).

**Percentage of volunteer attorneys who accepted a pro bono case in 2003 per registered attorneys (a) in each county; (b) in district:** See chart (p. 1A).

**Percentage of volunteer attorneys who did not accept a pro bono case in 2003 per registered attorneys (a) in each county; (b) in district:** See chart (p. 1A).

**Amount of grant received for 2004:** \$42,000.

**Amount of grant (2003 & prior years) projected to be unused as of 12/31/04:** \$ 0.

**Amount requested for 2005:** \$47,000.

# **DISTRICT 2 PRO BONO ACTIVITY - 2003**

<b>COUNTY</b>	<b>ELKHART</b>	<b>KOSCIUSKO</b>	<b>MARSHALL</b>	<b>ST. JOSEPH</b>	<b>ALL</b>
NUMBER REG ATTORNEYS IN COUNTY	221	80	48	555	904
PRO BONO CASES HANDLED BY VOLUNTEER LAWYERS DURING THE YEAR					
IND. LEGAL SERVICES	26	20	3	167	216
DIST. 2 PRO BONO PGM	5	3	9	105	122
	_____	_____	_____	_____	_____
TOTAL	31	23	12	272	338
# LAWYERS PROVIDING SERVICES	19 (8.6%)	11 (13.8%)	10 (20.8%)	126 (22.7%)	166 (18.4%)
VOLUNTEER LAWYERS ACCEPTING NEW CASES	11 (4.9%)	10 (12.5%)	9 (18.8%)	86 (15.5%)	116 (12.8%)
DISTRICT 2 VOL LAWYERS WITH NO REFERRALS IN 2003	20 (9.0%)	11 (13.8%)	5 (10.4%)	30 (5.4%)	66 (7.3%)

<b>PRO BONO DISTRICT NUMBER 2 LETTER OF REPRESENTATION</b>
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**The following representations**, made to the best of our knowledge and belief, are being provided to the Indiana Pro Bono Commission and Indiana Bar Foundation in anticipation of their review and evaluation of our funding request and our commitment and value to our Pro Bono District.

**Operation under Rule 6.5**

In submitting this application for funding, this district is representing itself as having a Pro Bono Plan, which is pursuant to Rule 6.5 of the Indiana Rules of Professional Conduct. The plan enables attorneys in our district to discharge their professional responsibilities to provide civil legal pro bono services; improves the overall delivery of civil legal services to persons of limited means by facilitating the integration and coordination of services provided by pro bono organizations and other legal assistance organizations in our district; and ensures access to high quality and timely pro bono civil legal services for persons of limited means by (1) fostering the development of new civil legal pro bono programs where needed and (2) supporting and improving the quality of existing civil legal pro bono programs. The plan also fosters the growth of a public service culture within the our district which values civil legal pro bono publico service and promotes the ongoing development of financial and other resources for civil legal pro bono organizations.

We have adhered to Rule 6.5 (f) by having a district pro bono committee composed of:

- A. the judge designated by the Supreme Court to preside;
- B. to the extent feasible, one or more representatives from each voluntary bar association in the district, one representative from each pro bono and legal assistance provider in the district, and one representative from each law school in the district; and
- C. at least two (2) community-at-large representatives, one of whom shall be a present or past recipient of pro bono publico legal services.

We have determined the governance of our district pro bono committee as well as the terms of service of our members. Replacement and succession members are appointed by the judge designated by the Supreme Court.

Pursuant to Rule 6.5 (g) to ensure an active and effective district pro bono program, we:

- A. prepare in written form, on an annual basis, a district pro bono plan, including any county sub-plans if appropriate, after evaluating the needs of the district and making a determination of presently available pro bono services;
- B. select and employ a plan administrator to provide the necessary coordination and administrative support for the district pro bono committee;
- C. implement the district pro bono plan and monitor its results;
- D. submit an annual report to the Commission; and

- E. forward to the Pro Bono Commission for review and consideration any requests which were presented as formal proposals to be included in the district plan but were rejected by the district committee, provided the group asks for review by the Pro Bono Commission.

### **Commitment to Pro Bono Program Excellence**

We also understand that ultimately the measure of success for a civil legal services program, whether a staffed or volunteer attorney program, is the outcomes achieved for clients, and the relationship of these outcomes to clients' most critical legal needs. We agree to strive for the following hallmarks which are characteristics enhancing a pro bono program's ability to succeed in providing effective services addressing clients' critical needs.

- 1. Participation by the local bar associations and attorneys.** The associations and attorneys believe the program is necessary and beneficial.
- 2. Centrality of client needs.** The mission of the program is to provide high quality free civil legal services to low-income persons through volunteer attorneys. Client needs drive the program, balanced by the nature and quantity of resources available.
- 3. Program priorities.** The program engages in a priority-setting process, which determines what types of problems the program will address. Resources are allocated to matters of greatest impact on the client and are susceptible to civil legal resolution. The program calls on civil legal providers and other programs serving low-income people to assist in this process.
- 4. Direct representation component.** The core of the program is direct representation in which volunteer attorneys engage in advocacy on behalf of low-income persons. Adjunct programs such as advice clinics, pro se clinics and paralegal assistance are dictated by client needs and support the core program.
- 5. Coordination with state and local civil legal providers and bar associations.** The programs work cooperatively with the local civil legal providers. The partnerships between the civil legal providers and the local bar association results in a variety of benefits including sharing of expertise, coordination of services, and creative solutions to problems faced by the client community.
- 6. Accountability.** The program has mechanisms for evaluating the quality of service it provides. It expects and obtains reporting from participating attorneys concerning the progress/outcome of referred cases. It has the capability to demonstrate compliance with requirements imposed by its funding source(s), and it has a grievance procedure for the internal resolution of disputes between attorneys and clients.
- 7. Continuity.** The program has a form of governance, which ensures the program will survive changes in bar leadership, and has operational guidelines, which enable the program to survive a change in staff.
- 8. Cost-effectiveness.** The program maximizes the level of high quality civil legal services it provides in relationship to the total amount of funding received.

**9. Minimization of barriers.** The program addresses in a deliberate manner linguistic, sensory, physical and cultural barriers to clients' ability to receive services from the program. The program does not create undue administrative barriers to client access.

**10. Understanding of ethical considerations.** The program operates in a way which is consistent with the Rules of Professional Conduct; client confidentiality is assured and conflicts of interest are avoided. The staff and volunteers are respectful of clients and sensitive to their needs.

**11. ABA Standards.** The program is designed to be as consistent with the ABA Standards for Programs Providing Civil Pro Bono Legal Services to Persons of Limited Means as possible.

No events, shortages or irregularities have occurred and no facts have been discovered which would make the financial statements provided to you materially inaccurate or misleading. To our knowledge there is nothing reflecting unfavorably upon the honesty or integrity of members of our organization. We have accounted for all known or anticipated operating revenue and expense in preparing our funding request.

We agree to provide human-interest stories promoting Pro Bono activities in a timely manner upon request of the Indiana Bar Foundation or Indiana Pro Bono Commission. We further agree to make ourselves available to meet with the Pro Bono Commission and/or the Indiana Bar Foundation to answer any questions or provide any material requested which serves as verification/source documentation for the submitted information.

**Explanation of items stricken from the above Letter of Representation:**

None.

**It is understood that this Letter does not replace the Grant Agreement or other documents required by the Indiana Bar Foundation or Indiana Pro Bono Commission.**

**Signatures:**

\_\_\_\_\_  
**Judicial Appointee Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Plan Administrator Signature**

\_\_\_\_\_  
**Date**

## 2005 PLAN SUMMARY

- 1. Please write a brief summary of the 2005 grant request. Please include information regarding your district's planned activities. The grant request should cover needs to be addressed, methods, target audience, anticipated outcomes, and how past difficulties will be addressed.**

**OVERVIEW.** The District 2 Pro Bono Legal Services Committee is requesting a grant of \$47,000 to fund its program in 2005. The Pro Bono Program is responding to an ever-increasing demand for legal services from low-income individuals and families who need assistance in securing guardianships, divorce and paternity cases involving potential abuse or inequity, loss of housing, and similar challenges. District 2's focus in 2005 will be on increasing the number of persons referred to volunteer lawyers and other resources, expanding the pool of volunteer attorneys, and collaborating with bench and bar groups in each county on promotion and recognition programs.

**INTAKE AND REFERRAL.** The Committee will continue to conduct intake interviews primarily by telephone. An intake form will be mailed or e-mailed to an applicant when requested or when the applicant does not have access to a telephone. After evaluating eligibility, the intake information will be entered into a central data base, so that when the plan administrator contacts a volunteer attorney, the client information can be quickly relayed for consideration and acceptance by the pro bono lawyer. A letter of referral will be sent to the attorney, with a copy to the client. Where the applicant can be helped by referral to other resources or given information, that assistance will be provided by the plan administrator.

**FOLLOW-UP AND REPORTING.** After confirming the initial referral, a status request will be mailed to the attorney every 4-6 months, and a closing report will be requested at the conclusion of the case. Statistical reports regarding the number of referrals, participating attorneys, type of case, outcome, and total pro bono hours will then be compiled and submitted to the Committee and the Indiana Pro Bono Commission.

**LAW STUDENT PROGRAM.** Where an attorney requests the assistance of a paralegal or law student, the plan administrator will locate a volunteer willing to assist the attorney.

**RECRUITMENT and RECOGNITION.** District 2 plans to co-sponsor a recognition luncheon or dinner with each bar association in the four-county area. We intend to solicit participation in the program by new attorneys, by mailing a letter and brochure about our program to attorneys who are sworn in and have joined the local bar association. In addition, we plan to initiate a "buddy" program whereby each volunteer attorney is asked to recruit a colleague to accept a pro bono assignment during the coming year. Finally, we will continue to support adoption of CLE credits for pro bono work, as a means of rewarding those attorneys who donate significant time each year to those in need.



## 2003 REPORT OF VOLUNTEER LAWYER CASES IN DISTRICT 2

[Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 6A. Please list each attorney only once in the volunteer lawyer column but complete one line for each pro bono case for that attorney.]

**Definitions:**

**Case:** A legal matter referred to and accepted by a pro bono attorney volunteer.

**Volunteer Lawyer:** An attorney who has rendered pro bono service to at least one low-income client during the year or accepted a pro bono referral from the identified program. This does not include attorneys who are on the list of pro bono volunteers but who have never taken a case. The case numbers do not include cases screened, only cases actually referred to a pro bono attorney.

**Case Type:** Please use the abbreviations listed in Indiana Supreme Court Administrative Rule 8(B)(3).

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): District 2 Pro Bono Program.

**IOLTA funding accounts for 100 % of total pro bono provider budget.**

Volunteer Lawyer ID Number	County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
001	St. Jos.	2003	2003	1	GU
003	St. Jos.	2002			DR
004	St. Jos.	2002	2003	5	Mediation
007	St. Jos.	2002			DR
007	St. Jos.	2003	2003	3	Soc Sec
007	St. Jos.	2003	2003	4	JP
008	St. Jos.	2003			DR
009	St. Jos.	2003	2003	3	AD
011	St. Jos.	2003	2003	1	Empl Contract
012	St. Jos.	2003	2003	2	Soc Sec
012	St. Jos.	2003			Soc Sec
013	St. Jos.	2003	2003		JP, JC
014	St. Jos.	2002	2003	3	DR
014	St. Jos.	2003			DR
015	St. Jos.	2003			DR
015	St. Jos.	2003			DR

**District 2 Pro Bono Program (continued)**

<b>Volunteer Lawyer ID Number</b>	<b>County</b>	<b>Year Case Accep- ted</b>	<b>Year Case Closed</b>	<b>Number of Hours</b>	<b>Case Type</b>
016	St. Jos.	2003	2003	3	CC
016	St. Jos.	2002	2003	10	JP
016	St. Jos.	2002	2003	16	JP
016	St. Jos.	2003			JP
016	St. Jos.	2003	2003	7	GU
016	St. Jos.	2003	2003	5	JP
016	St. Jos.	2003	2003	10	JP
016	St. Jos.	2003			DR
016	St. Jos.	2003	2003	1	Utility deposit
016	St. Jos.	2003			JP
016	St. Jos.	2003			MI
017	St. Jos.	2003	2003	6	DR
017	St. Jos.	2003	2003	7	DR- Marshall Co.
018	St. Jos.	2003			DR
019	St. Jos.	2003	2003	2	GU
019	St. Jos.	2003	2003	37	DR
020	St. Jos.	2003	2003	6	DR
020	St. Jos.	2002	2003	6	DR
021	St. Jos.	2002			JP
021	St. Jos.	2002			DR
021	St. Jos.	2003			JP
021	St. Jos.	2003			GU
021	St. Jos.	2003	2003	4	JP
021	St. Jos.	2003	2003	5	DR
021	St. Jos.	2003	2003	3	JP
022	St. Jos.	2003			DR
022	St. Jos.	2003	2003	10	DR
023	St. Jos.	2002	2003	3	CC
024	St. Jos.	2003	2003	16	DR
025	St. Jos.	2002	2003	23	DR
026	St. Jos.	2003	2003	4	DR
027	St. Jos.	2003	2003	12	MI

<b>Volunteer Lawyer ID Number</b>	<b>County</b>	<b>Year Case Accepted</b>	<b>Year Case Closed</b>	<b>Number of Hours</b>	<b>Case Type</b>
028	St. Jos.	2003			DR
029	St. Jos.	2002			Non-profit
030	St. Jos.	2003			DR
032	St. Jos.	2002	2003	9	DR
035	St. Jos.	2002	2003	40	Pub housing
036	St. Jos.	2003			DR
039	St. Jos.	2003	2003	6	GU
040	St. Jos.	2002	2003	3	DR
040	St. Jos.	2003	2003	5	JP
041	St. Jos.	2003	2003	55	Immig/asylum
042	St. Jos.	2002			CC
042	St. Jos.	2002			Landlord/tenant
043	St. Jos.	2002	2003	6	Bankruptcy
044	St. Jos.	2003			DR
045	St. Jos.	2003	2003	3	Landlord/tenant
046	St. Jos.	2003			GU
047	St. Jos.	2002			GU
048	St. Jos.	2003			GU
048	St. Jos.	2002	2003	4	GU
050	St. Jos.	2002			GU
053	St. Jos.	2003			DR
054	St. Jos.	2002	2003	12	GU
054	St. Jos.	2003			DR
055	St. Jos.	2003	2003	4	Will/Adv Dir.
056	St. Jos.	2003			GU
057	St. Jos.	2003			DR
059	St. Jos.	2003			DR
061	St. Jos.	2002			DR
062	St. Jos.	2003			JC
064	St. Jos.	2002	2003	65	DR
065	St. Jos.	2003	2003	14	GU
066	St. Jos.	2003	2003	1	GU

Volunteer Lawyer ID Number	County	Year Case Accepted	Year Case Closed	Number of Hours	Case Type
067	St. Jos.	2002			CT
069	St. Jos.	2003			DR
070	St. Jos.	2002	2003	6	Landlord/tenant
071	St. Jos.	2003	2003	2	CC
072	St. Jos.	2003	2003	2	Landlord/tenant
073	St. Jos.	2003	2003	14	JP
074	St. Jos.	2003			DR
075	St. Jos.	2002	2003	10	Soc Sec
075	St. Jos.	2003			Soc Sec
077	St. Jos.	2003			DR
079	St. Jos.	2003			DR
080	St. Jos.	2003	2003	2	Mediation
081	St. Jos.	2003			JP
082	St. Jos.	2003	2003	2	EU
085	St. Jos.	2003			CT
086	St. Jos.	2002	2003	3	JP
086	St. Jos.	2003			JP
087	St. Jos.	2003	2003	3	Will/adv.dir.
088	St. Jos.	2002	2003	10	MF
089	St. Jos.	2003			Pension
092	St. Jos.	2003	2003	2	Bankruptcy
093	St. Jos.	2002	2003	65	MF
094	St. Jos.	2003			GU
095	St. Jos.	2002	2003	8	DR
096	St. Jos.	2003	2003	1	GU
St. Joseph County					
TOTALS: 74		105		575	

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District 2 Pro Bono Program (continued)

Volunteer	County	Year	Year	Number	Case Type
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Lawyer Id Number		Case Accep- ted	Case Closed	of Hours	
101	Elkhart	2003			DR
102	Elkhart	2002	2003	13	DR
107	Elkhart	2003			DR
108	Elkhart	2003			DR
110	Elkhart	2001			Bankruptcy
<b>ELKHART COUNTY TOTALS: 5</b>		<b>5</b>		<b>13</b>	
203	Kosciusko	2003			DR
204	Kosciusko	2002	2003	5	DR
205	Kosciusko	2003			DR
<b>KOSCIUSKO CO. TOTALS: 3</b>		<b>3</b>		<b>5</b>	
301	Marshall	2003			GU
302	Marshall	2003			DR
302	Marshall	2003			DR
304	Marshall	2002	2003	6	GU
305	Marshall	2003			Real Estate
307	Marshall	2003			DR
308	Marshall	2003			DR
209	Marshall	2003			DR
210	Marshall	2003			DR
<b>MARSHALL COUNTY TOTALS: 8</b>		<b>9</b>		<b>6</b>	
<b>OVERALL TOTALS: 90 Attorneys</b>		<b>122 Cases</b>		<b>599 Hours</b>	

## 2003 REPORT OF VOLUNTEER LAWYER LIMITED INFORMATION ACTIVITY IN DISTRICT 2

This limited legal information chart can include activities such as pro se clinics and call-in or walk-in informational services. Please attach additional pages for each pro bono provider that receives IOLTA funding, whether directly or indirectly, in your district. See the sample additional pro bono provider page 7A. Please list each attorney only once in the volunteer lawyer column but complete one line for each type of legal information activity for that attorney.

**Name of Pro Bono Provider** (includes legal service provider, court, plan administrator, bar association, and other organizations): District 2 Pro Bono Program

Volunteer Lawyer Name	County	Type of Activity	Number of Hours
Kelly Baer	St. Jos.	Walk-in (TTALL)	2
Deanne Benjamin	St. Jos.	Walk-in (TTALL)	2
Bruce Bondurant	St. Jos.	Walk-in (TTALL)	2
Donald Berger	St. Jos.	Walk-in (TTALL)	2
Kathleen Brickley	St. Jos.	Walk-in (TTALL)	2
Mary Butiste-Jones	St. Jos.	Walk-in (TTALL)	2
Edward Chapleau	St. Jos.	Walk-in (TTALL)	2
Eugene Chipman Sr.	Marshall	Walk-in (TTALL)	2
Sherry Clarke	St. Jos.	Walk-in (TTALL)	6
Robert Conte	St. Jos.	Walk-in (TTALL)	2
Eileen Doran	St. Jos.	Walk-in (TTALL)	2
Angela Hooegeveen	St. Jos.	Walk-in (TTALL)	2
Susan Johnson	St. Jos.	Walk-in (TTALL)	2
Carrie Koontz	St. Jos.	Walk-in (TTALL)	2
James Lewis	St. Jos.	Walk-in (TTALL)	2
Lawrence McHugh	St. Jos.	Walk-in (TTALL)	2
Carol Montavon	St. Jos.	Walk-in (TTALL)	2
Angelika Mueller	St. Jos.	Walk-in (TTALL)	2
Jody Odell	St. Jos.	Walk-in (TTALL)	2
Steven Parkman	St. Jos.	Walk-in (TTALL)	2
Angela Russo	St. Jos.	Walk-in (TTALL)	2
Thomas Shaffer	St. Jos.	Walk-in (TTALL)	2
Susan Taylor	St. Jos.	Walk-in (TTALL)	2
John Yarger	St. Jos.	Walk-in (TTALL)	2
<b>TOTAL: 24</b>		<b>TOTAL:</b>	<b>52</b>

## 2003 REPORT

**Please list your District's 2003 activities--including committee meetings, training, attorney recognition, marketing and promotion--in chronological order.**

Jan. 20, 2003                      Talk to a Lawyer Live (Martin Luther King Day)

Twenty-four St. Joseph County attorneys were available to answer questions at South Bend Century Center from 11:30 to 5:30. During each 2-hour shift, 2 paralegal volunteers helped screen those coming for advice and directing them to the appropriate volunteer attorney. By concentrating publicity in community centers and churches, we attracted many lower-income and non-white participants.

Jan. 10, 2003                      CLE Seminar – Notre Dame Continuing Education Center

Nineteen volunteer attorneys attended a 6-hour Continuing Legal Education seminar which introduced them to legal principles they were likely to encounter on Martin Luther King Day. Thirteen attorneys who had not previously been pro bono volunteers participated enthusiastically in these programs.

June 3, 2003                      District 2 Pro Bono Legal Services Committee meeting

Members reviewed plan activity to date and approved 2002 Report and 2004 Annual Plan.

Oct. 9, 2003                      Recognition Luncheon - Goshen Bar Association

Sixteen attorneys attended a luncheon at Bread & Chocolate to honor pro bono volunteers. Speakers included Monica Fennell, Executive Director of the Indiana Pro Bono Commission; Hon. Terry Shewmaker, Judge, Elkhart County Circuit Court; Sherry Clarke, District 2 Plan Administrator; and Angelika Mueller, Managing Attorney, Indiana Legal Services. Certificates of Appreciation were presented to 2002-3 volunteer attorneys by Judge Shewmaker.

Nov. 20, 2003                      Recognition Luncheon - Elkhart Bar Association

Twenty-seven attorneys attended a luncheon at Christiana Country Club. J. Phillip Burt, Chairman of the Indiana Pro Bono Commission spoke about the activities of the Pro Bono Commission, Indiana Bar Foundation, and Indiana State Bar Association, in promoting pro bono service; and Hon. James Rieckhoff, Judge of Elkhart Superior Court No. 5, spoke about the need for pro bono service and the reasons why all lawyers should respond. Certificates of Appreciation were presented to 2002-3 volunteer attorneys by Judge Rieckhoff and Ms. Mueller.

Nov. 25-28, 2003 Recruitment packet sent to all Elkhart County attorneys.

Dec. 17, 2003 CLE seminar at Roseland Ramada Inn - "Introduction to Pro Bono."

## 2003 REPORT

**Please provide a short summary of how the provision of pro bono service is coordinated in your district, including the intake process, the relationships of pro bono providers in the district, how referrals are made, and how reporting is done.**

The free legal service providers within District 2 continue to refer conflict and overflow cases to the District 2 Program. The directors of Indiana Legal Services, Elkhart Legal Aid Services, and Notre Dame Legal Aid Clinic each serve as a member of the District 2 Committee.

Indiana Legal Services, in addition to its staff attorney work, refers cases to its own Community Volunteer Lawyers panel, primarily in the area of domestic relations, consumer and housing law. While many attorneys are members of both the District 2 and ILS panels, the existence of both programs undoubtedly makes pro bono service available to more individuals. The two programs share data on a bi-monthly basis as to which attorneys have accepted pro bono cases during the preceding period, to create a more balanced distribution of referrals. Information regarding new attorneys who sign up for participation in the District 2 Pro Bono Program is shared with the Indiana Legal Services pro bono coordinator. The Plan Administrator compiles quarterly and annual reports regarding referrals by both programs within each county and for the district as a whole.

The District 2 Plan Administrator also consults with each of the other legal service programs to meet emergency needs for legal assistance.

The Plan Administrator, along with the directors of Indiana Legal Services and the Notre Dame Legal Aid Clinic, serves on the St. Joseph County Bar Association Pro Bono Committee, which provides key support in recruitment and recognition efforts in that county. During the last part of 2003, the Committee planned a newsletter devoted to pro bono programs in St. Joseph County and helped draw up a modest-means referral program for St. Joseph County, to be implemented in 2004.

**Please describe any special circumstances, including difficulties encountered, affecting your District's 2003 implementation of its plan.**

Mailings to members of the St. Joseph County family law section, to Elkhart County bar members, and to selected attorneys and firms to encourage participation, were only modestly successful. About 40 new attorneys were recruited during the year, but a significant number of attorneys who had been active were lost due to, among other things, retirement, maternity leave, moving out of the area, or taking public sector jobs which prohibit private practice. Finally, the number of applicants needing assistance with guardianships, divorce, paternity and post-dissolution issues of child support, visitation, and custody greatly exceeds the number of attorneys who can accept such cases, even though many lawyers generously volunteer to take two or more new cases each year.

# **BUDGETS FOR 2003, 2004 AND 2005 *FOR IOLTA FUNDS ONLY***

<b>Cost Category</b>	<b>2003 actual expendi- tures</b>	<b>2003 Budget</b>	<b>2004 actual expendi- tures</b>	<b>2004 Budget</b>	<b>2005 Budget</b>
<b>A. Personnel Costs</b>					
1. Plan Adminis- trator	29,880	30,000	13,846	30,000	30,000
2. Paralegals	255	----			
3. Others					
4. Employee benefits	5,278	5,500	3,901	7,800	8,000
a. Insurance		2,000	2,237	4,474	4,650
b. Retirement plans		1,300	623	1,246	1,250
c. Other-FICA		2,200	1,041	2,080	2,100
<b>5. Total Person- nel Costs</b>	35,413	35,500	17,747	37,800	38,000
<b>B. Non- Personnel Costs</b>					
1. Occupancy					
2. Equipment rental					
3. Office supplies	983	1,000	239	900	900
4. Telephone	660	700	210	800	800
5. Travel	334	400	113	400	400
6. Training	147	900	20	500	400
7. Library					
8. Malpractice Insurance	1,740	1774	1,697	2,000	1,800
9. Dues & fees	---	200	200	200	
10. Audit					
11. Contingent reserve					
12. Litigation re- serve					
13. Marketing/ ) promotion and )	822	1,500	124	3,000	2,000
14. Attorney ) Recognition )	"	"	"	"	"
15. Litigation					

Expenses (includes expert fees)	741	900	631	1,000	1,500
16. Property Acquisition	224	500	---	---	---
17. Contract Services	3,505	3,500	570	1,200	1,000
18. Grants to other pro bono providers					
19. Other					
<b>20. Total Non-Personnel Costs</b>	9,156	12,289	3,804	10,000	9,000
<b>C. Total Expenditures</b>	44,569	47,789	21,551	47,800	47,000

**IOLTA funds received 2003: \$40,480. IOLTA funds received 2004: \$42,000.**

### **Budget Narrative**

Please provide descriptions of the following line items in the foregoing budget chart, by item number, in the space provided.

Lines (A)(1), (2), (3) Please indicate the number of hours per week for each personnel position and rate of pay.

Plan Administrator: 35 hrs/week; \$577/week.

Line (B)(1) Please describe the occupancy cost in terms of square footage, utilities or other amenities and indicate whether the occupancy cost is above or below the market rate for that space.

Note that we incur no occupancy costs, as shared space is provided by the St. Joseph County Probate Court.

<b>ANNUAL TIMETABLE FOR SUBMISSION OF FORMS AND CHECKS:</b>
---

January 1:	Checks distributed
July 1:	Annual report, plan and grant application due to IPBC
November:	Notification of awards
December 1:	IBF grant agreement due and revised budget due